

# Measuring the Impact of the Olympic Winter Games on Utah's Image

*UT DCED*



WIRTHLIN WORLDWIDE

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Spring 2002

# Study Objectives

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To determine if there was a measurable impact in:

- Awareness,
- Image, or
- Likelihood to:
  - Live,
  - Do business, or
  - Vacation in Utah

as a direct result of the 2002 Games.

# Methodology

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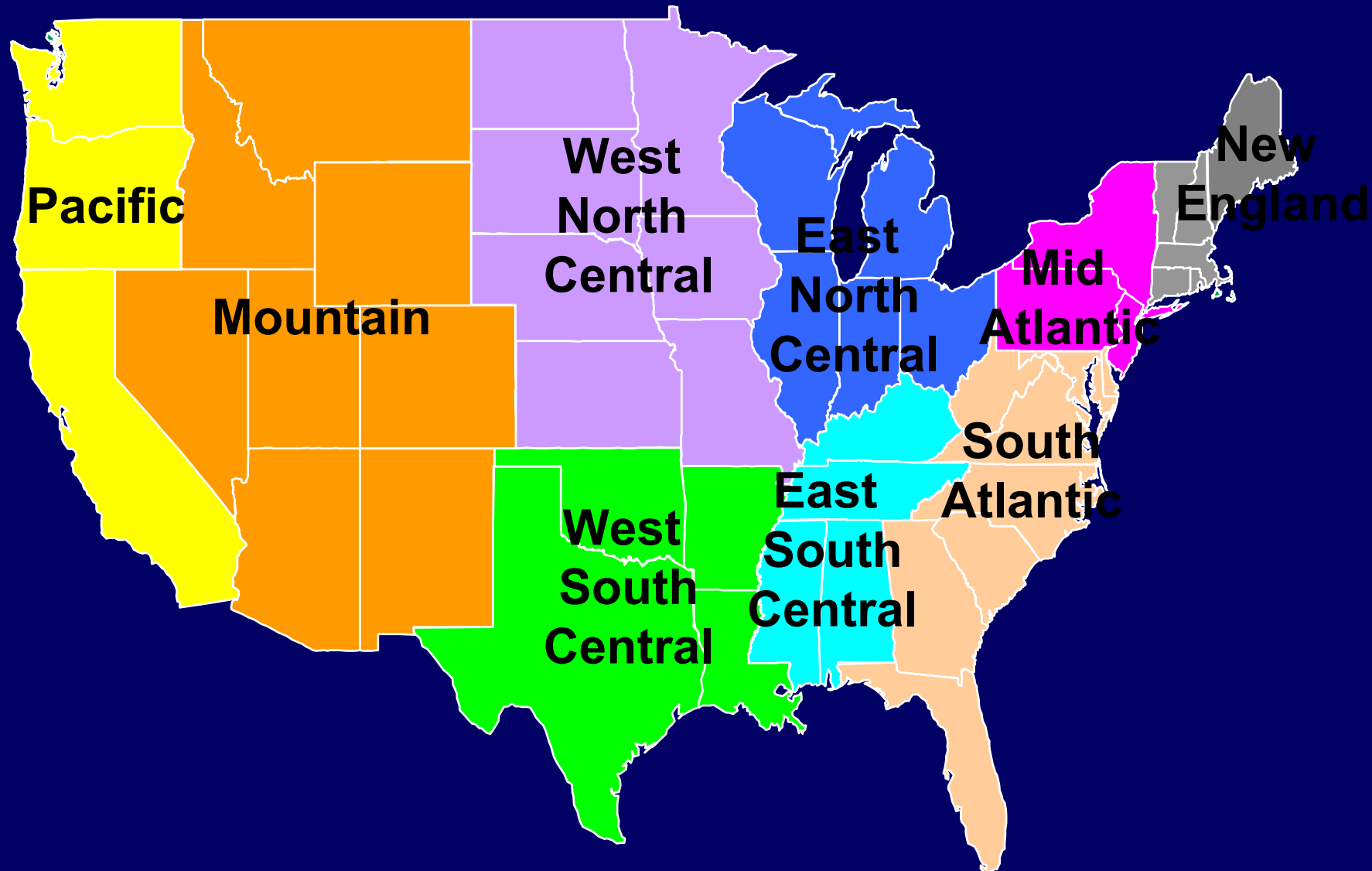
## General Public

	<u>Pre</u>	<u>Post</u>
➤ Number of adult Americans	1,000	1,002
➤ Field dates:	11/30-12/3	3/1-3/4
➤ Margin of Error	± 3.1%	± 3.1%

## Corporate Executives

	<u>Pre</u>	<u>Post</u>
➤ Number of Executives	150	150
➤ Field dates:	10/24-11/19	3/21-4/25
➤ Margin of Error	± 8.0%	± 8.0%

# Geographic Regions of Nation

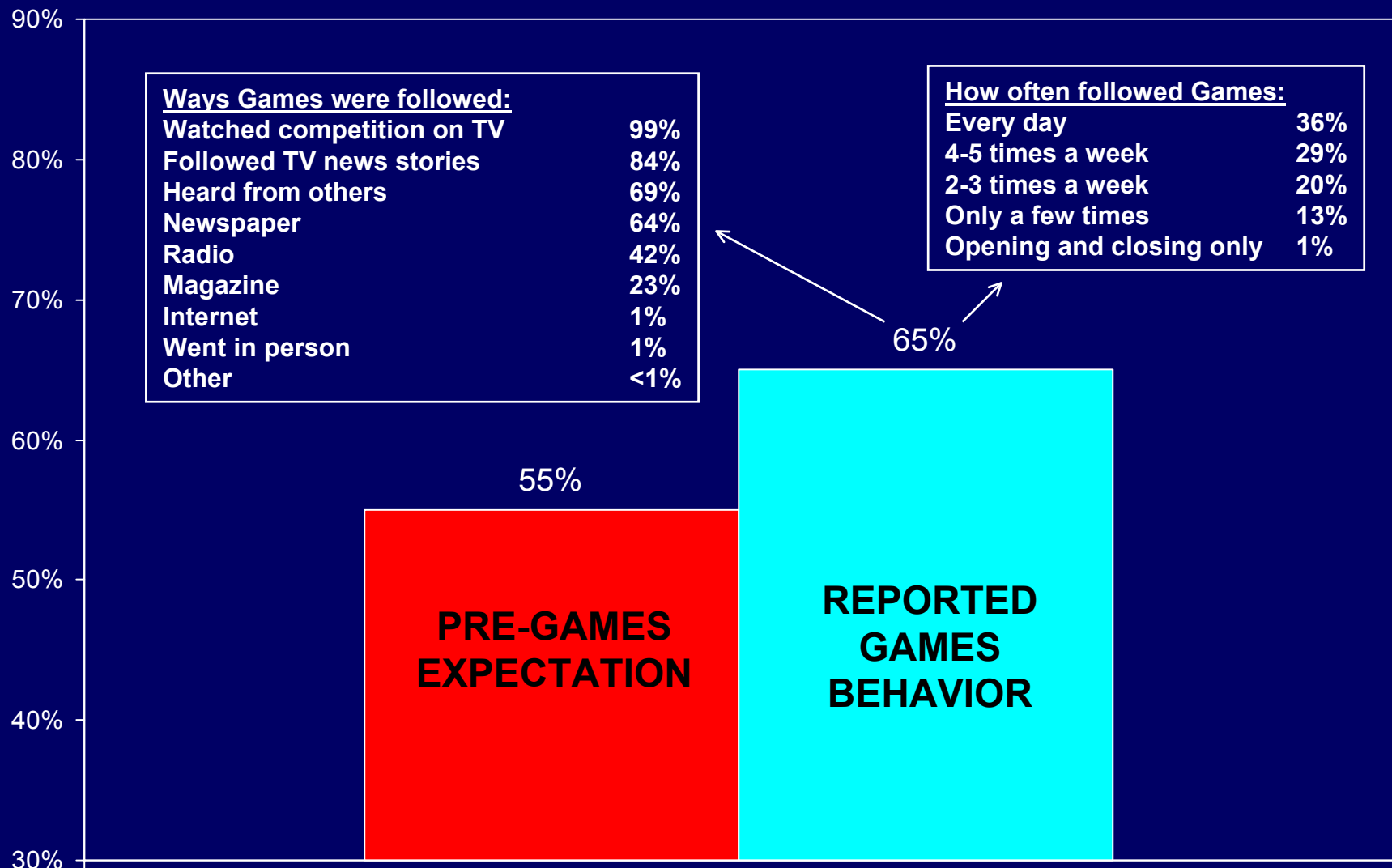


# Key Findings Among General Public

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- 1) Utah's image improved slightly as a result of the 2002 Olympic Winter Games across the country.**
- 2) Roughly 7.1 million more adults say they are likely to vacation in Utah than before the 2002 Games.**
- 3) Utah is more recognized today for its scenic beauty, mountains, winter sports, ski resorts, cleanliness, and friendly people after exposure through the Games.**

# Public Following of the 2002 Olympics Higher than Pre-Games Expectation



# Americans Most Likely to Watch Games

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Post graduate education	83%
Female 55+	81%
\$40K-<\$60K annual hh income	78%
65+	76%
Retired	76%
\$60K+ annual hh income	75%
College grad	74%
West North Central Region	74%
Pacific Region	74%
East South Central Region	73%
Female 35-54	73%
55+	72%
White	72%



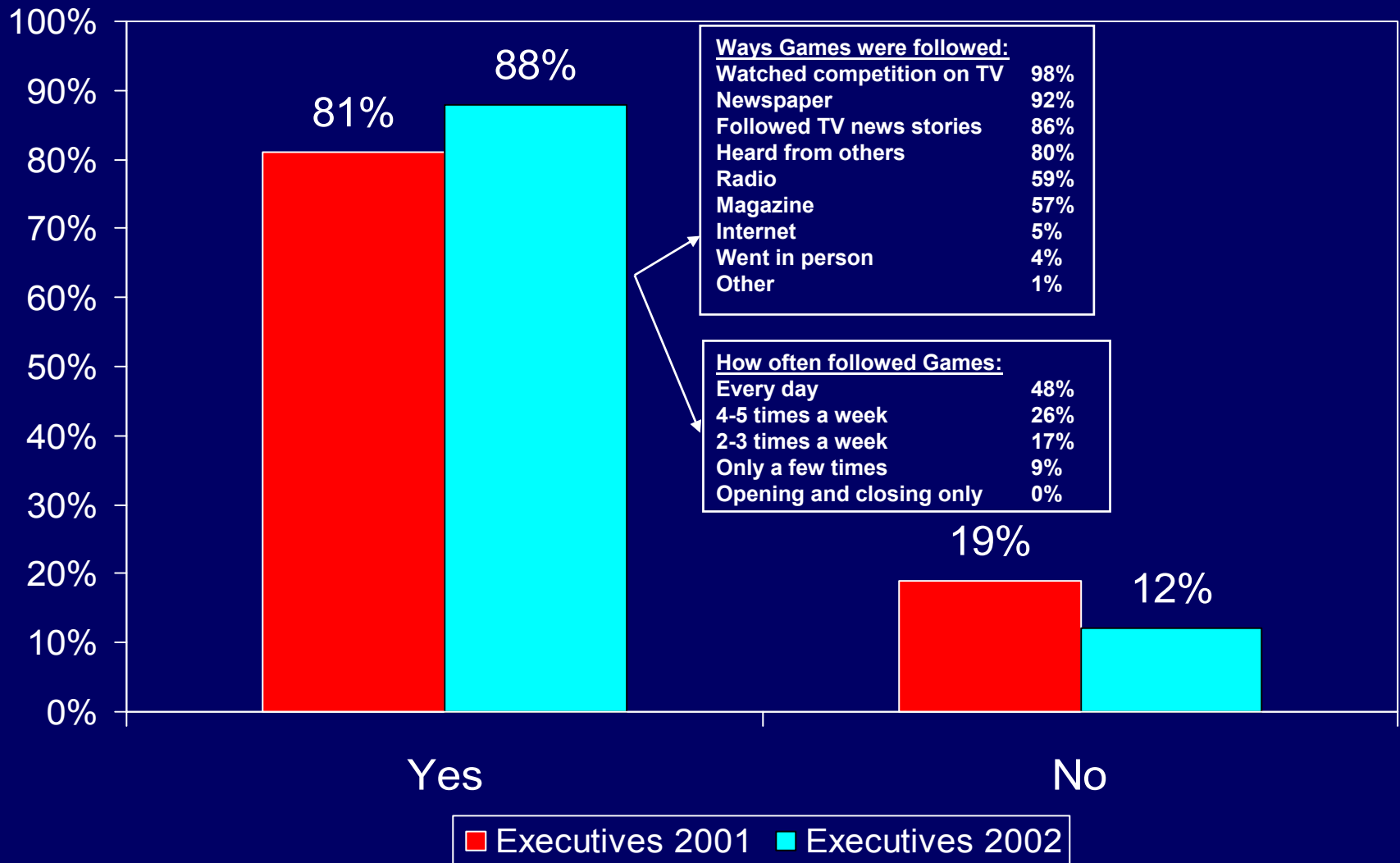
# Key Findings Among Corporate Executives

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- 1) There is a significant increase in positive top-of-mind perceptions of the state among executives.**
- 2) Among those who would consider Utah today, we see a doubling of the recognition of quality workforce as driver to relocate or expand here.**
- 3) There are directional increases in the likelihood to vacation and/or to move here among executives (a 6-point increase).**



# Nearly All Executives Followed the 2002 Olympic Winter Games

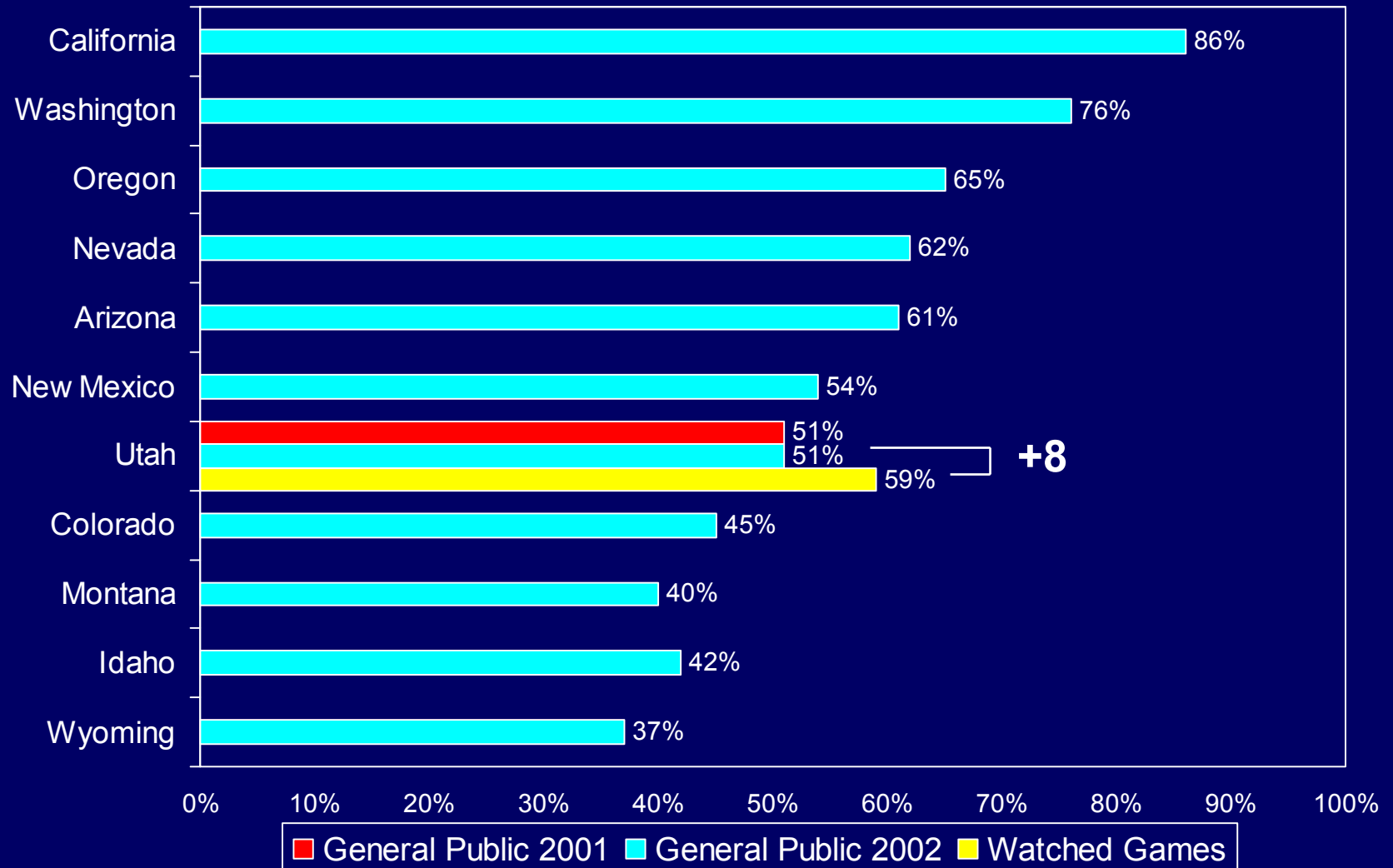


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## **Awareness Measurements Among Public**



# More Who Watched Games Can Name Utah as a Western State



# Many Viewers Reported Learning Specific New, Positive Things About Utah

<b>Positive (Net)</b>	<b>38%</b>
Beautiful scenery	5%
Winter sports capabilities	5%
Friendly people	4%
Beautiful mountains	3%
Ski resorts	3%
Did a good job/were a good host city	2%

Top mentions

<b>Didn't Learn Anything New</b>	<b>39%</b>
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<b>Miscellaneous Neutral</b>	<b>17%</b>
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<b>Negative (Net)</b>	<b>6%</b>
Native American population	1%
Drinking laws	1%
Olympic issues	1%

Top mentions



# Those Most Likely to Say They Learned Positive Things about Utah

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Post graduate education	45%
Female 55+	44%
\$40K-<\$60K annual hh income	44%
Retired	44%
Mid-Atlantic Region	44%
Female 18-34	43%
65+	43%



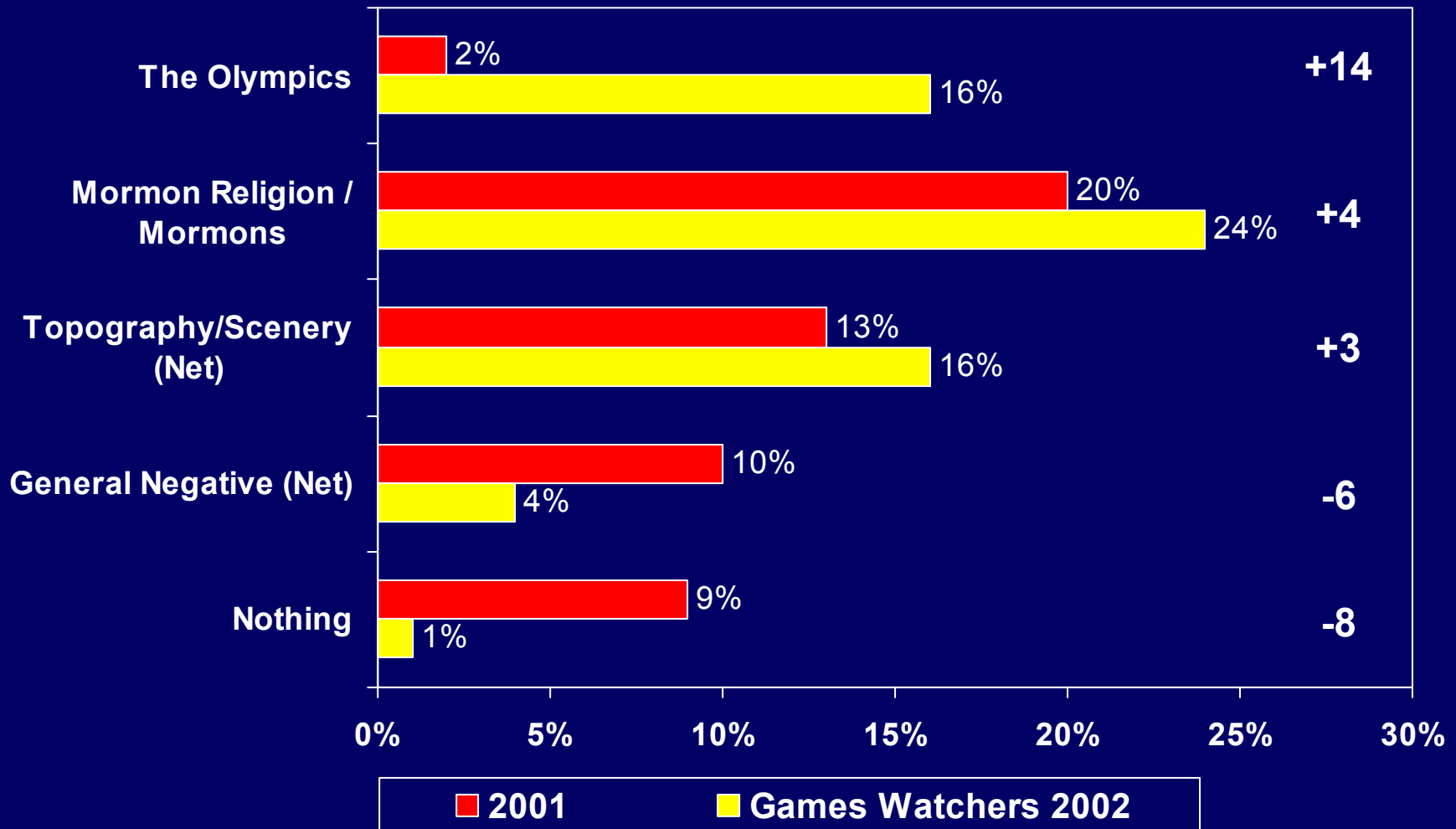
# Top-of-Mind Awareness of Utah Changed Slightly Among Total Population

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Mormon Religion/Mormons	23%	(+3)
The Olympics	12%	(+10)
Mountains/Mountainous	6%	(Same)
Salt Lake City	4%	(-2)
Cold Weather/Snow	8%	(+3)
Beautiful Scenery	3%	(+2)
General Negative	5%	(-5)



# Among Games' Watchers Utah Became More Associated with Olympics, Mormons, & Scenery



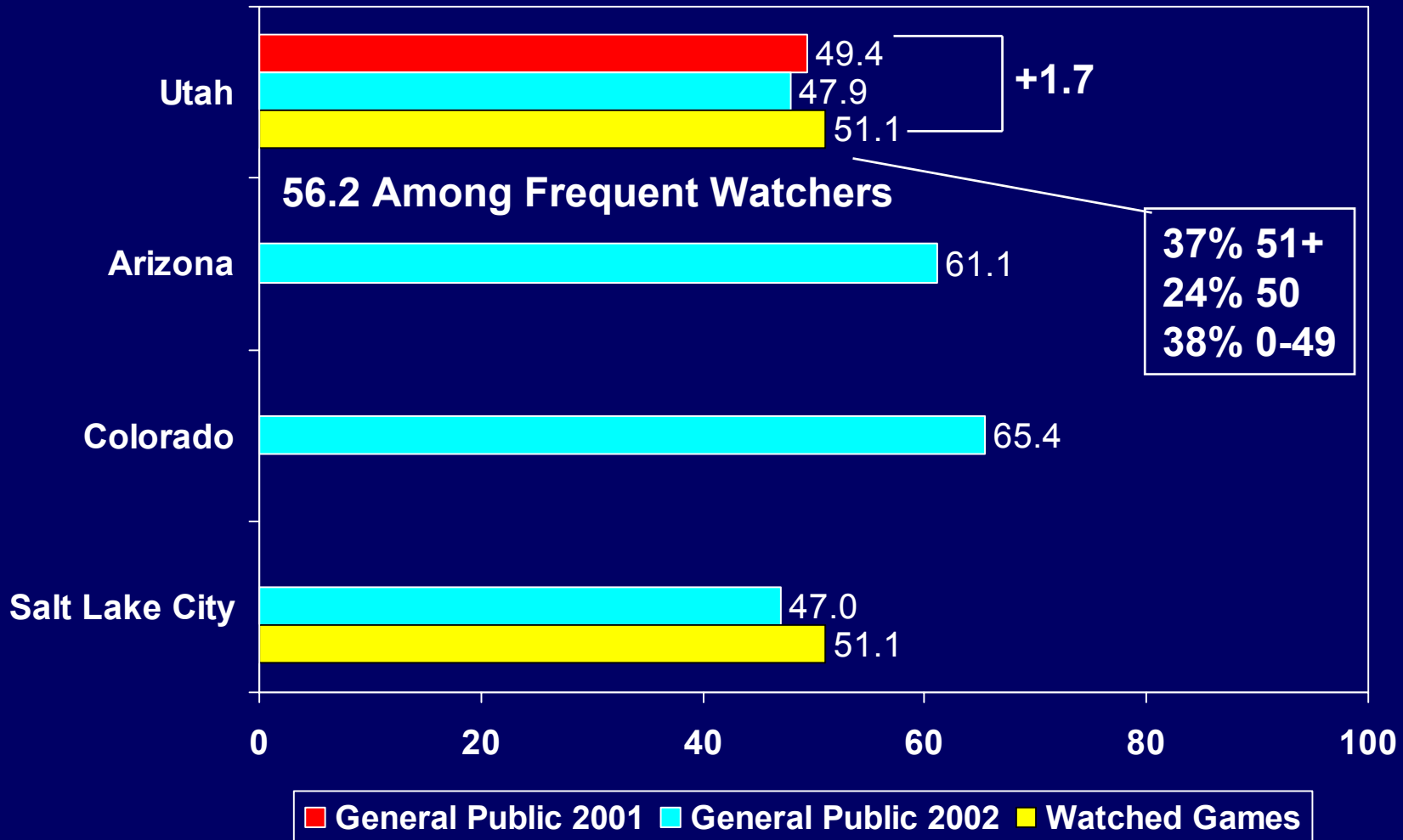
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## **Image Measurements Among Public**





# Slight Improvement in Utah Thermometer Rating Among Games' Watchers



# Profile of Positive, Swing, Negative Groups

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## Positive Image

Older Men  
Higher Educated  
Higher Income  
Retirees  
Other Christians  
Married

## Swing Image

Women  
Middle Education  
Homemaker  
Catholics  
Widows  
Caucasian  
Married Women

## Negative Image

Younger Adults  
Lower Educated  
Lower Income  
Baptists  
Born Again  
Singles  
Div/Sep  
Afr. American  
Hispanics  
Single Women

# Pre-Post Improvement in Thermometer Greatest Among African Americans and in the East

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African Americans	+10.5	(36.4)
East South Central Region	+10.4	(46.1)
New England Region	+9.3	(56.1)
Male 55+	+5.4	(57.6)
Married Women	+4.1	(50.3)
Post Graduates	+3.3	(54.7)
Deep South Region	+3.1	(45.3)

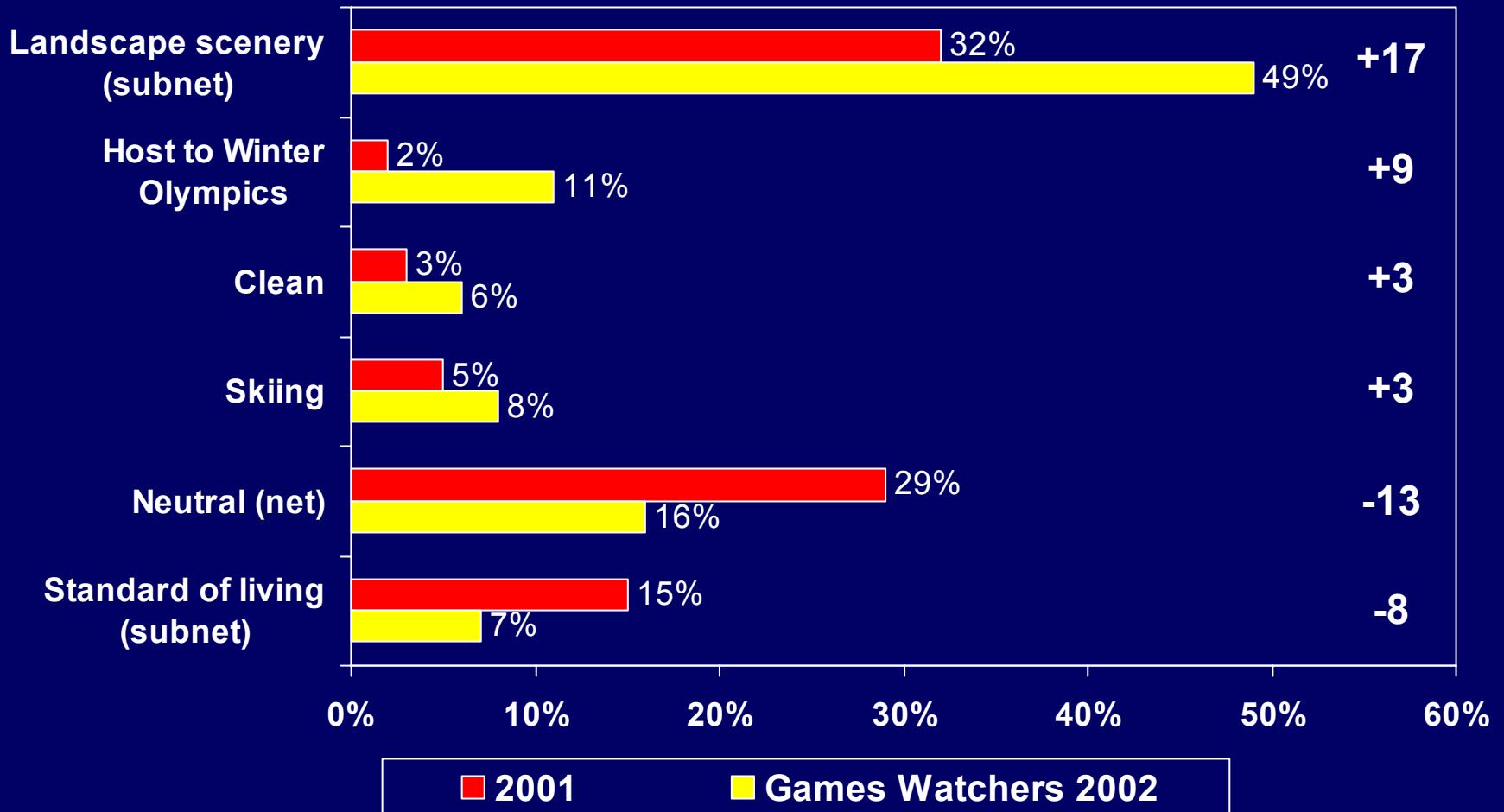
# Top Reasons for Positive Utah Rating Among Total Population

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Scenic beauty	29%
Mountains	13%
Good/friendly people	9%
Host to Winter Olympics	8%
Nice place to visit / live	7%
Good weather	6%
Skiing	6%
Clean	5%
Lakes	4%
Sparsely populated	3%
Wide open spaces	3%
Good National Parks	3%
Peaceful	3%
Outdoor activities/sports	3%
Strong religious beliefs	3%



# Mountain Scenery and Olympic Hosts Most Improved Positives of the State



# Top Reasons for Negative Utah Rating Among Total Population

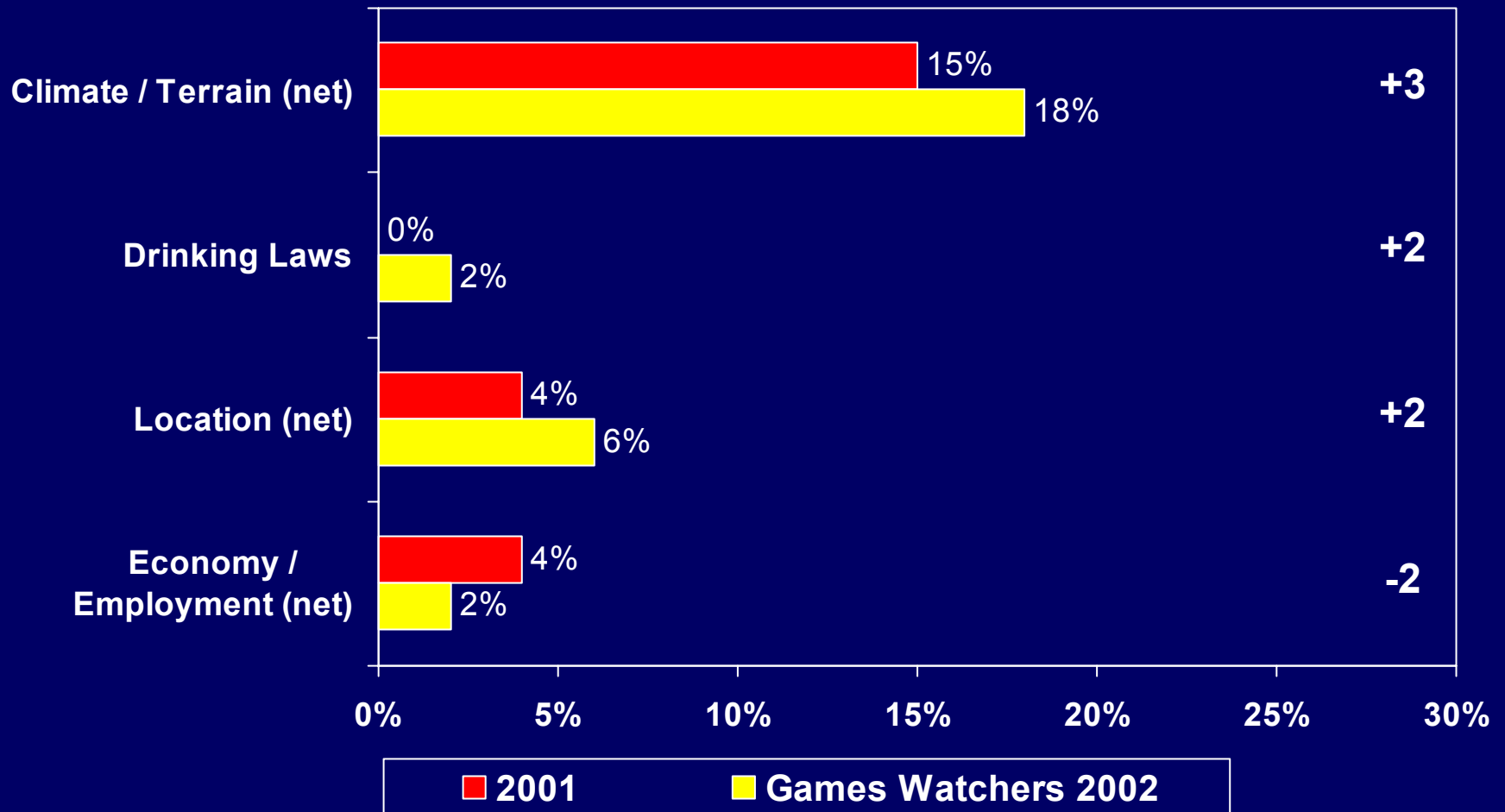
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Unfamiliar with Utah	27%
Have never been to Utah	13%
Too cold / dry climate	16%
Mormons / religious influence	12%
Sparsely populated	4%
Terrain	4%
Nothing to do / no activities	3%

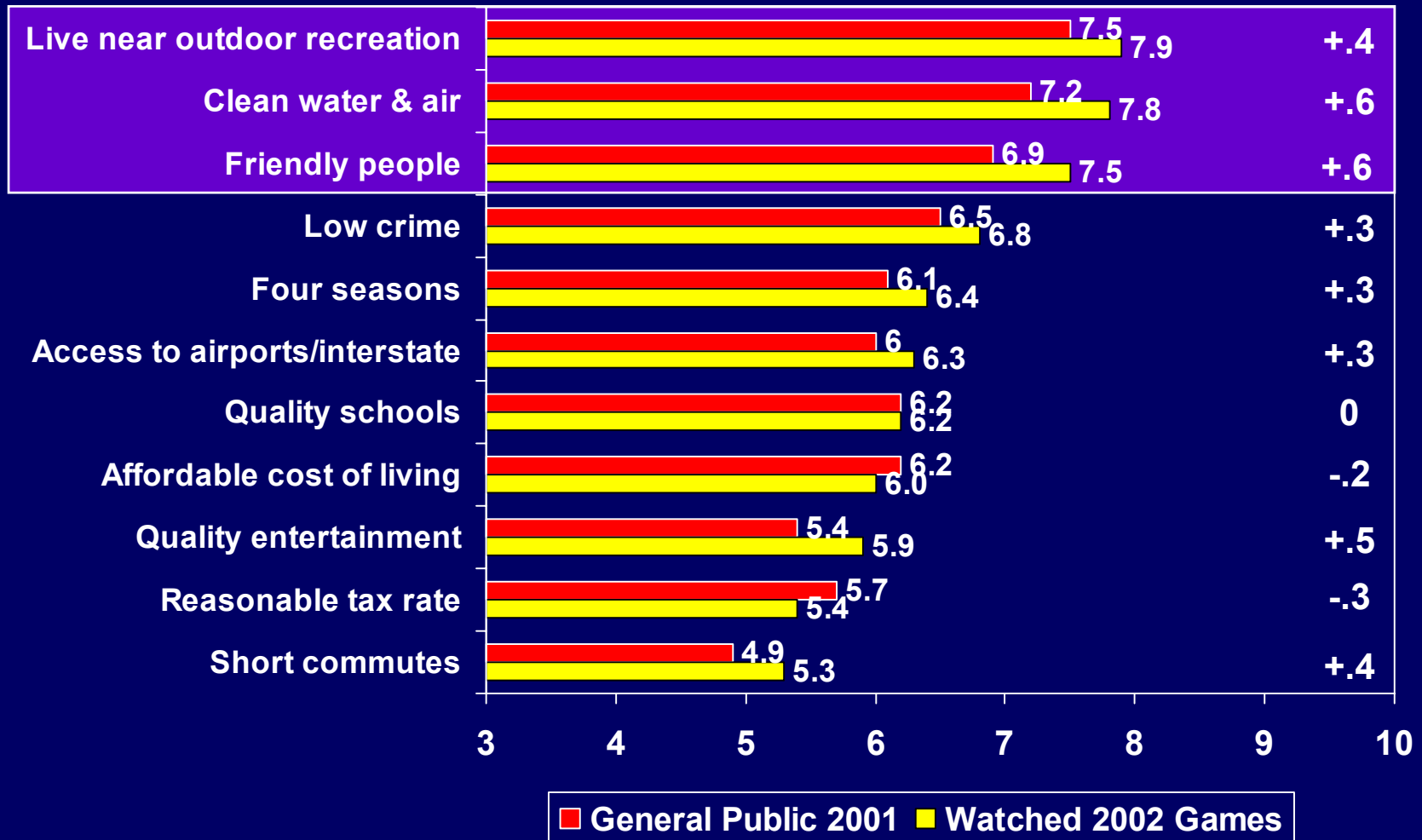
Drinking laws	1%
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# Lack of Familiarity and Cold Climate Still Drive Negatives

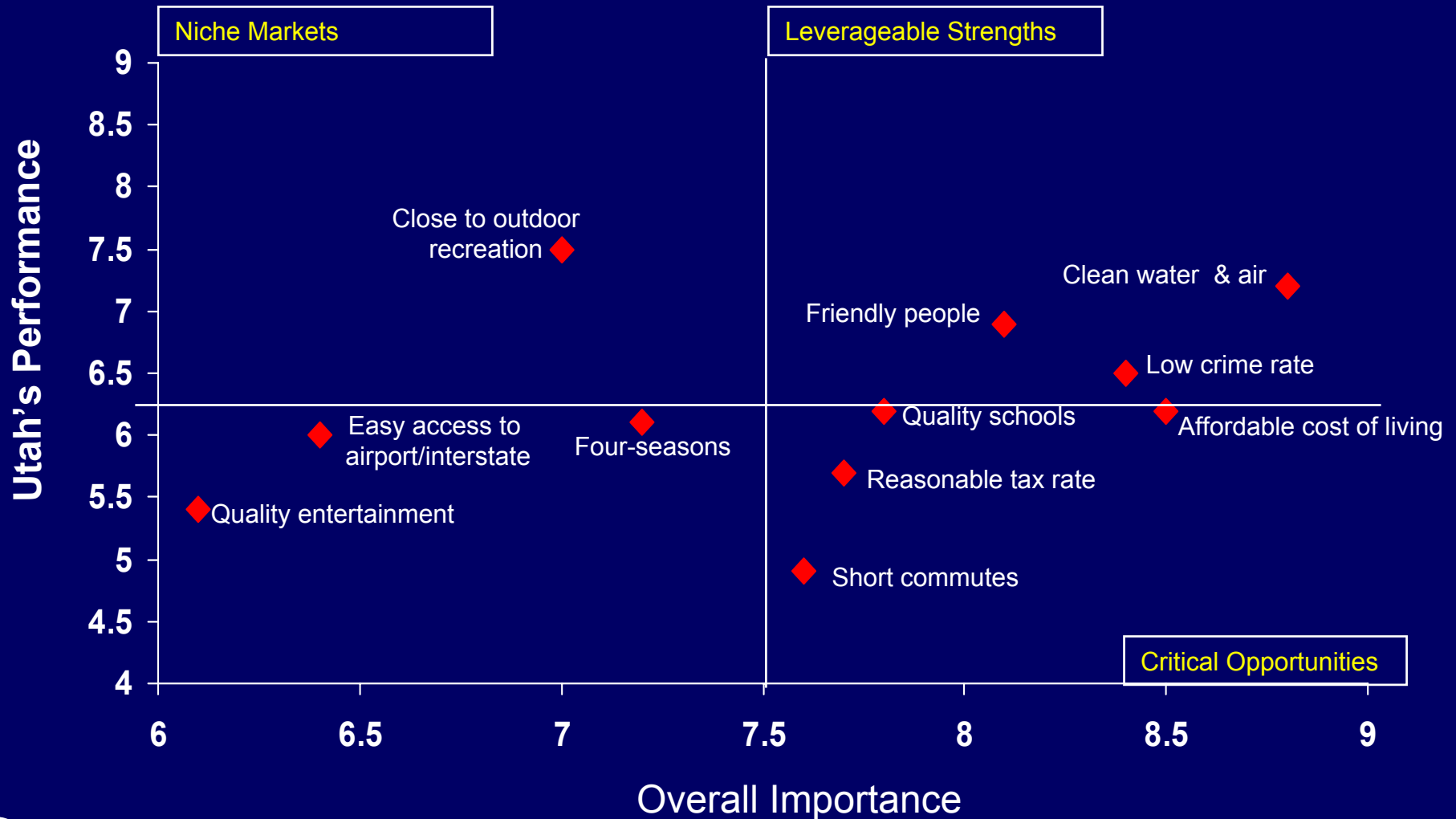


# Measured Progress in Critical Attributes of Utah as a Place to Live

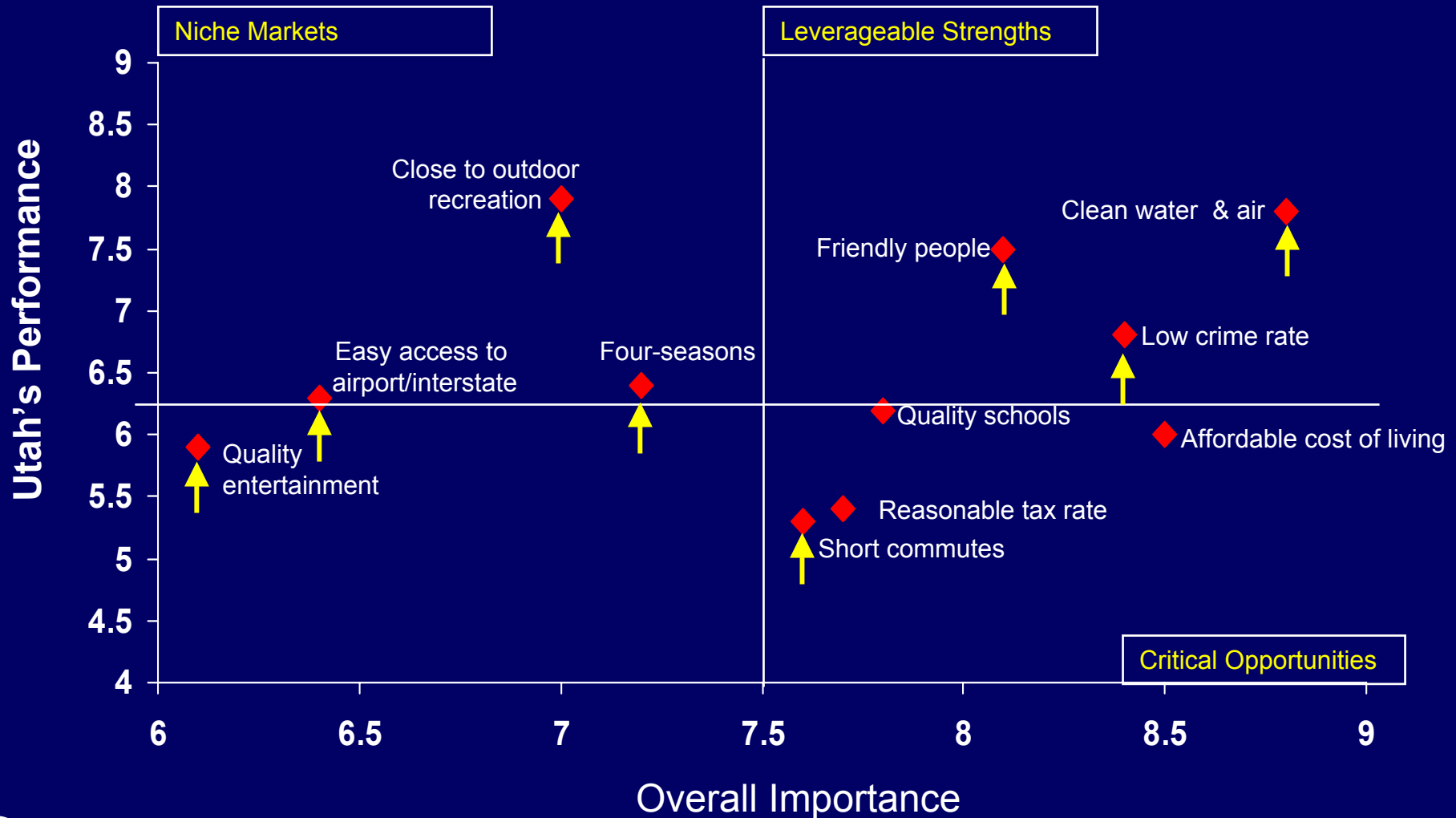




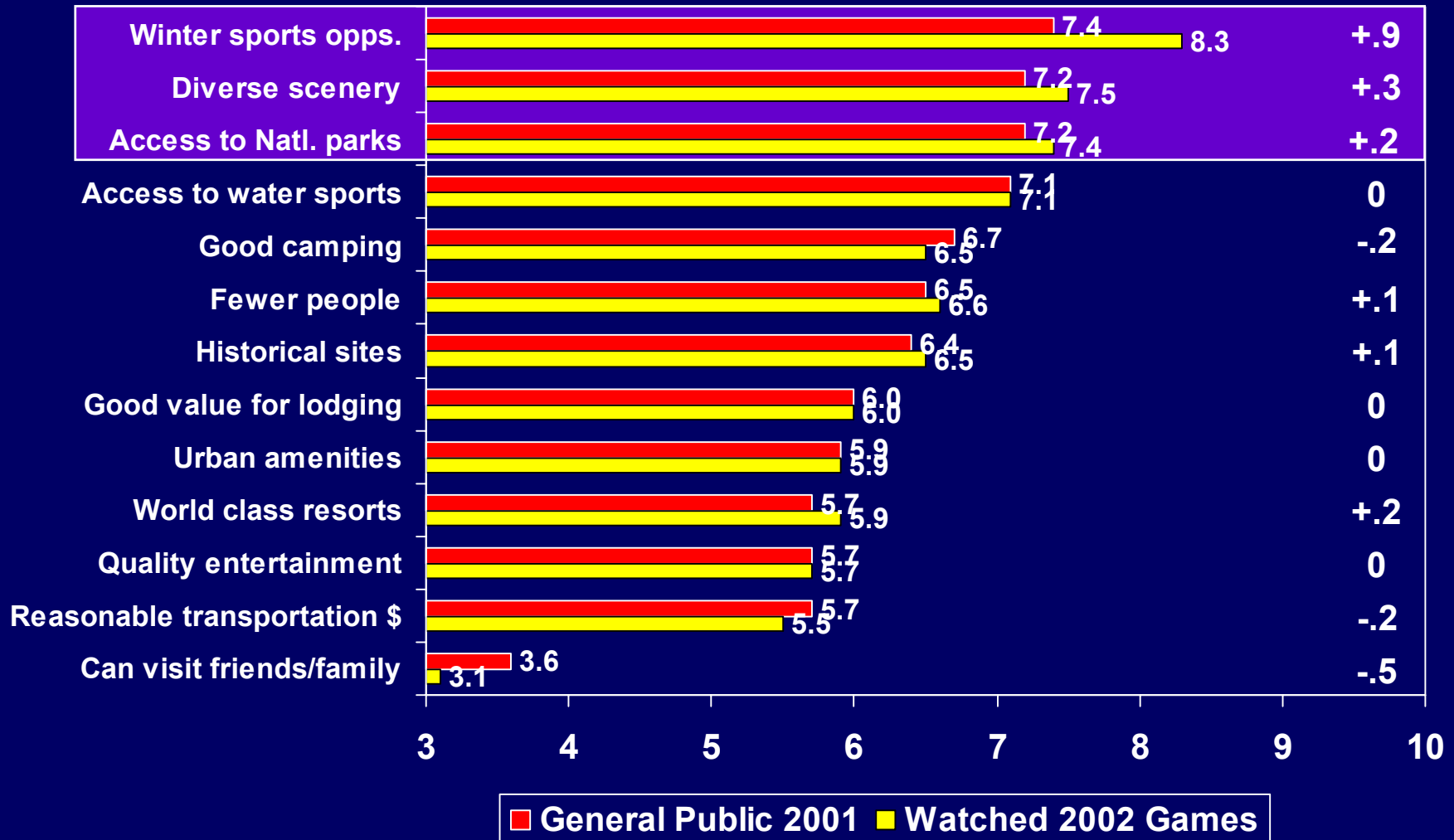
# Pre-Games Assessment of Utah's Image Across Attributes of Place to Live



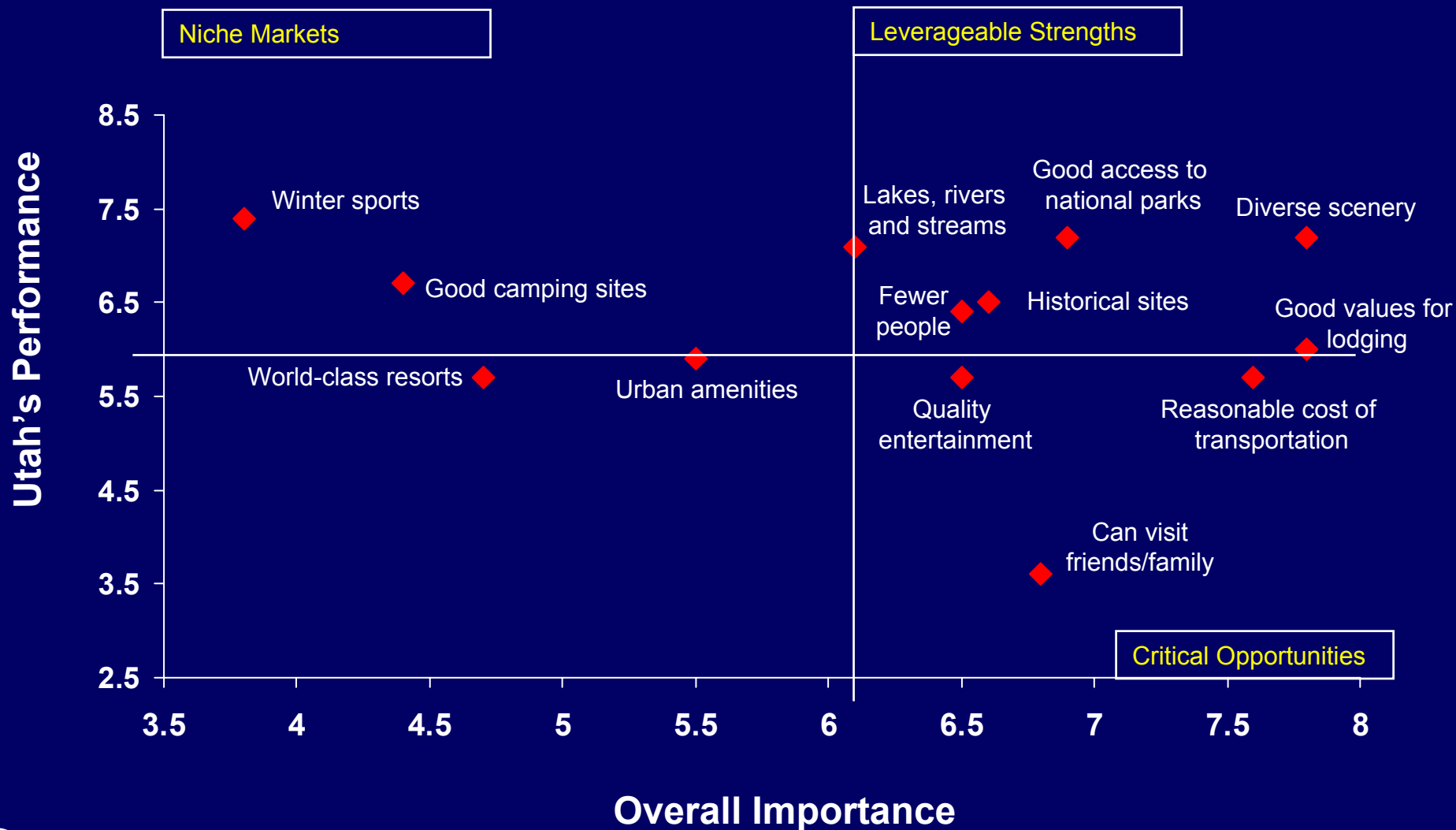
# Measurable Improvement in Assessing Utah as a Place to Live Among Games' Watchers



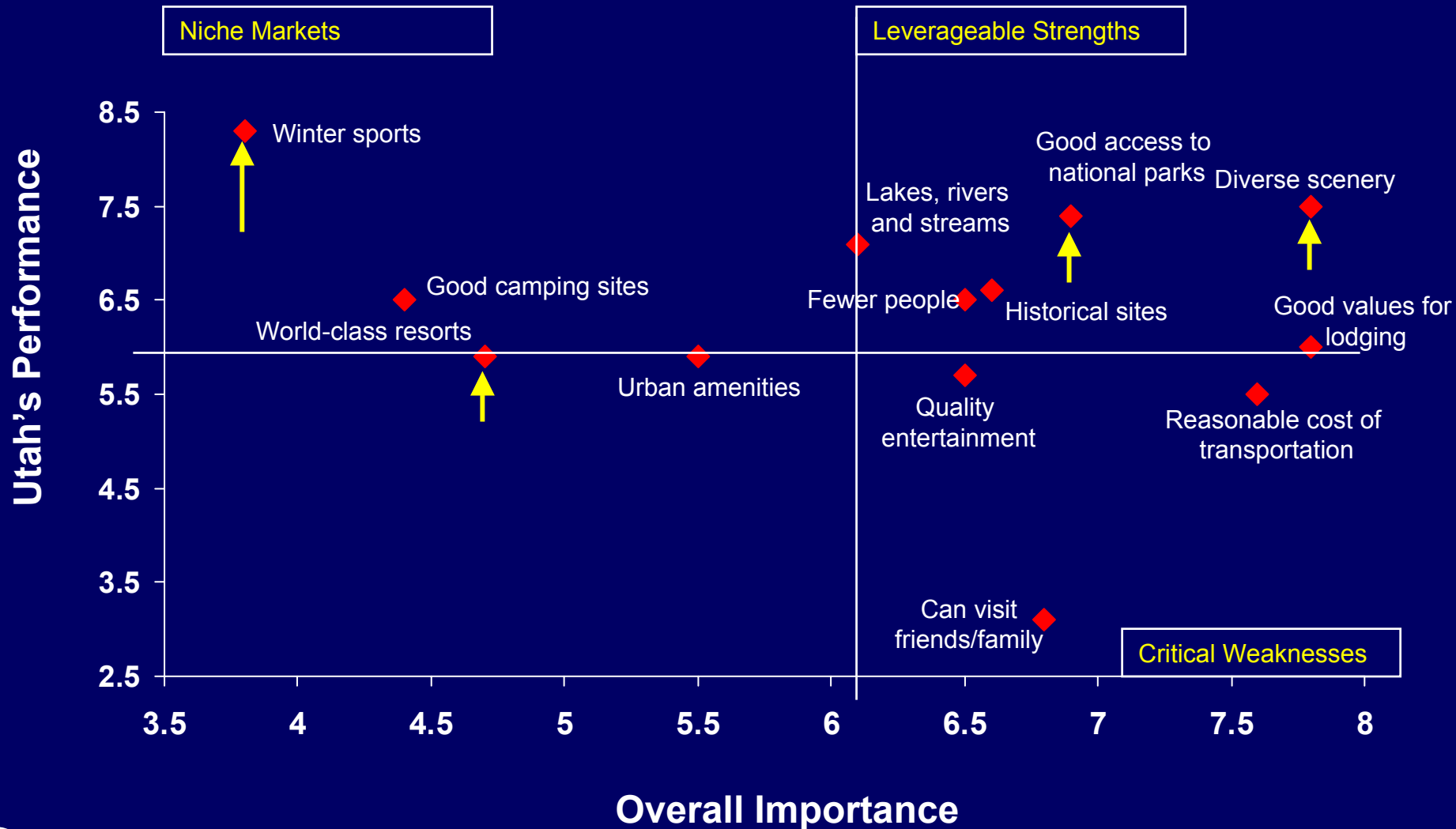
# Significant Growth in Recognition of Winter Sports Opportunities in Utah



# Pre-Games Assessment of Utah's Image Across Attributes of Place to Vacation



# Measurable Improvement Primarily in Winter Sports Opportunities for Utah Vacation



# Niche Markets: Place to Live, Place to Vacation

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## Outdoor Recreation

Rocky Mountain

\$30-\$40K

Age 55+

Western States

Men

Student

Retiree

Female 55+

## Resorts

\$100K+

Afr. Amer.

Students

Bus. Owner

Women

## Camping Sites

Rocky Mountain

Afr. American

California

Western States

Men under 35

\$30-\$40K

## Winter Sports

Students

Bus. Owner

Men under 35

\$80-\$100K

New England

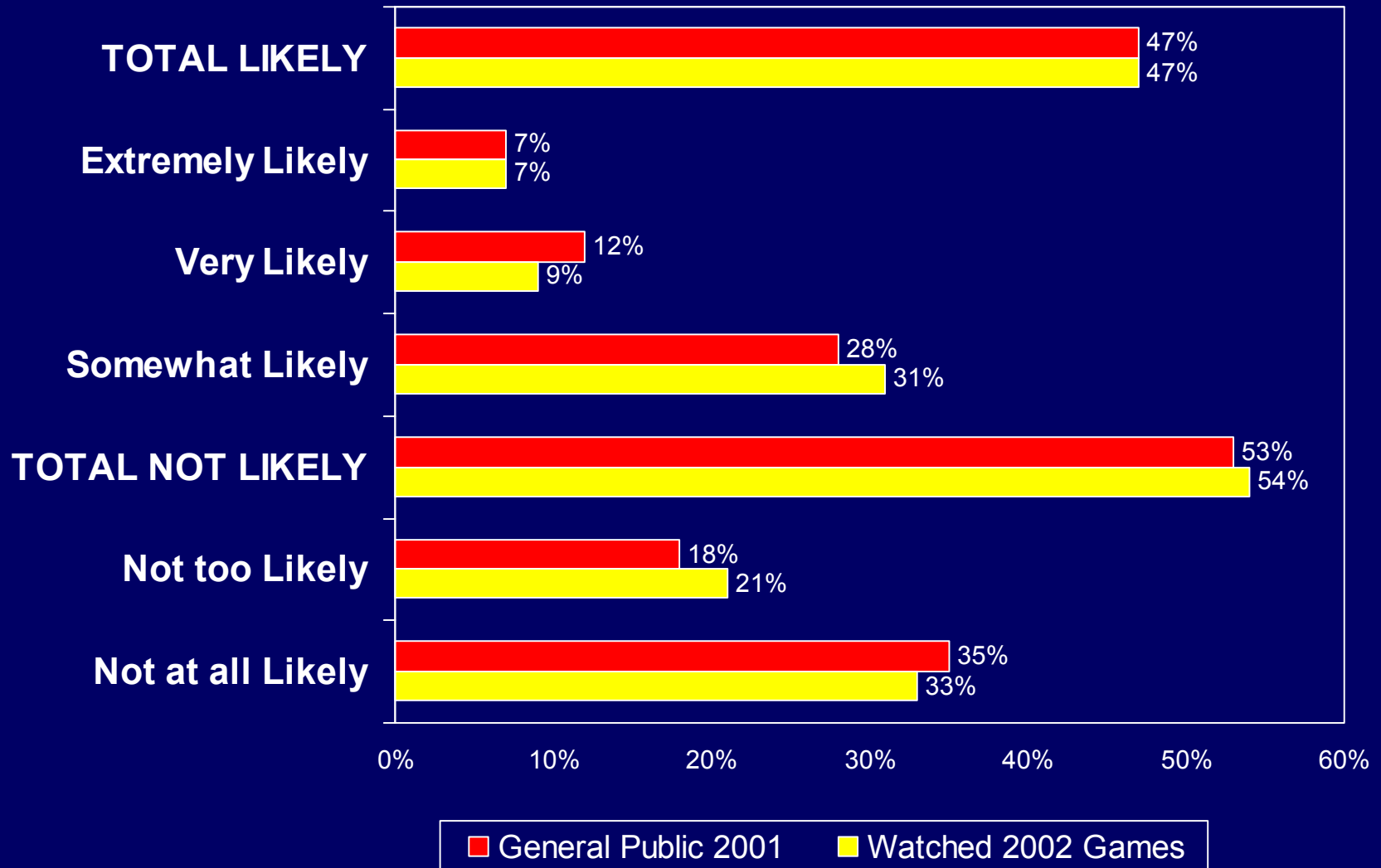


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## **Impact on Behaviors Among General Public**



# It Will Take More Time and Effort to Increase Likelihood to Move to Utah





# Americans Who Say “Extremely Likely” to Consider Moving to Utah

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African American 35-54	31%
Some HS education	21%
African American Female	21%
Div / Sep w/o children	20%
West South Central	19%
Divorced / Separated	18%
<\$15K annual hh income	17%
45-54	15%
“Other” Ethnicity	15%
\$30K-<\$40K annual hh income	14%
West North Central	12%



# Americans Who Say “Likely” to Consider Moving to Utah

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New England	70%
18-24	70%
Single w/ children	68%
Hispanics	67%
Some HS education	66%
Single	66%
West South Central	61%
African American Female	60%
Homemaker	58%
No Children	57%
\$30-40K annual hh income	54%
Catholics	53%
Democrats	52%
Non Born-Again	51%



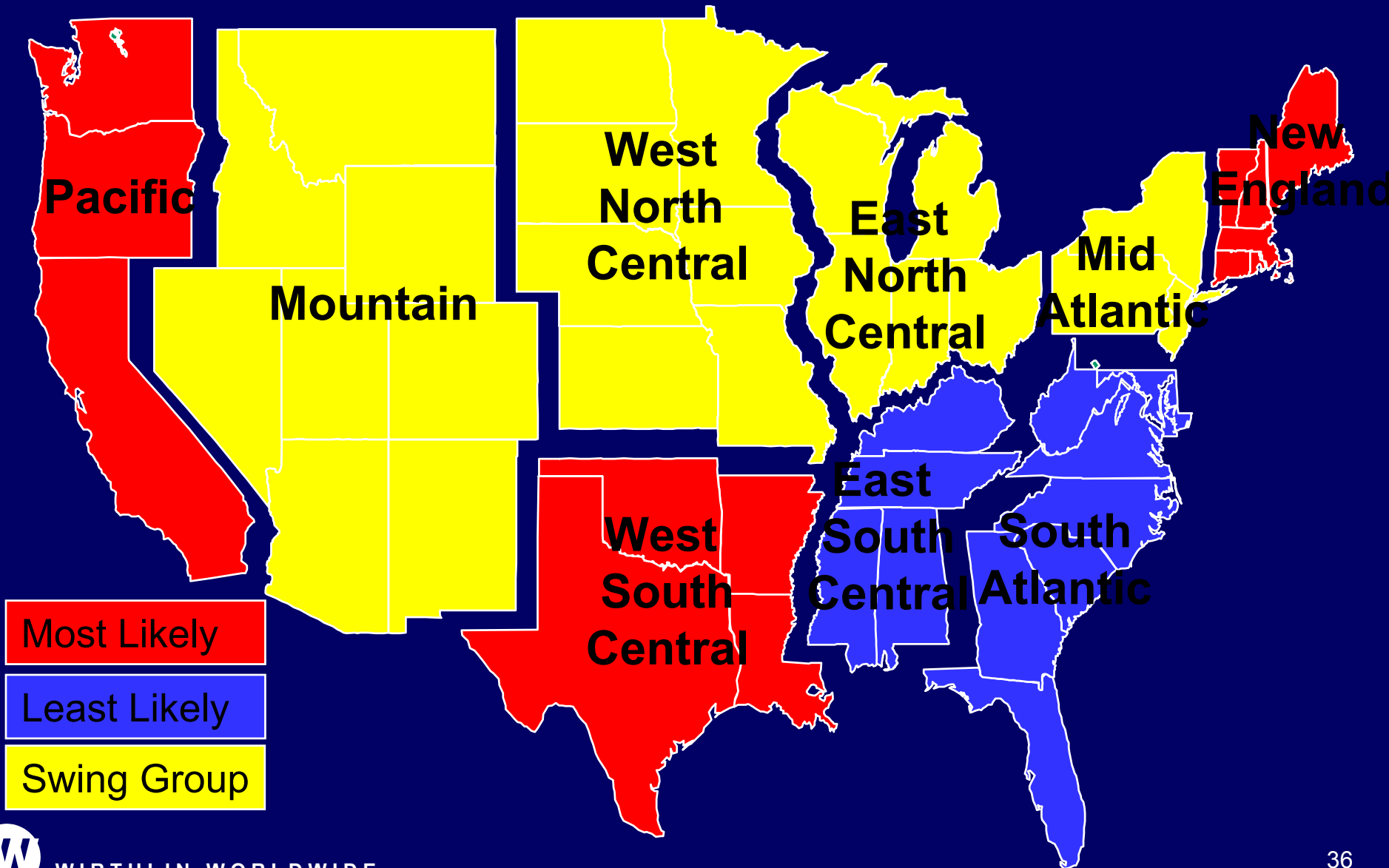
# Americans Who Say “Not At All Likely” to Consider Moving to Utah

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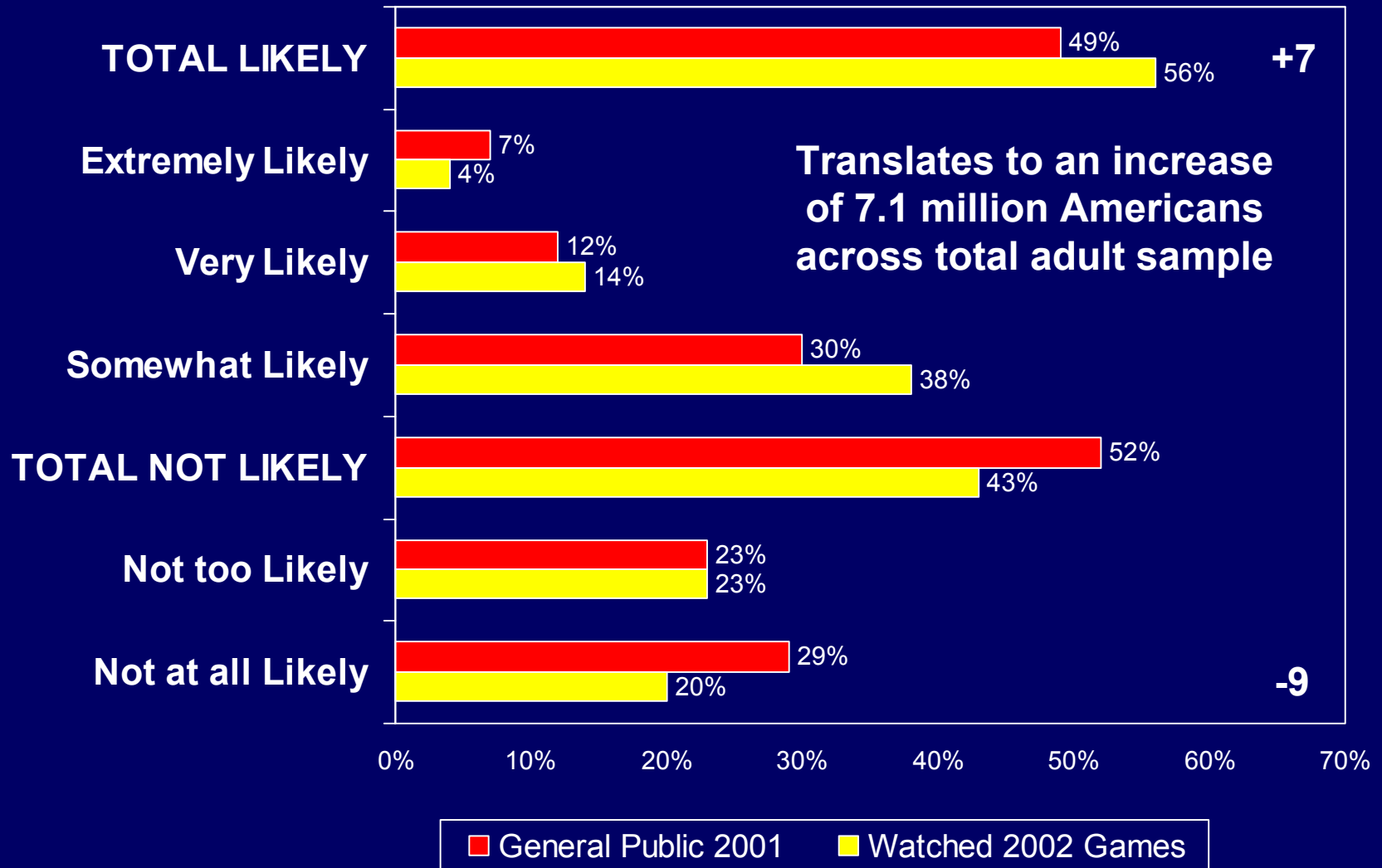
Widow	68%
65+	66%
Female 55+	64%
Caucasian 55+	59%
Div / Sep w/o children	58%
55+	54%
Retired	54%
East South Central	53%
Baptists	48%
Male 55+	43%
55-64	42%
Born Again Christians	42%
Caucasian Female	42%
West North Central	41%
HS graduate only	41%
Mountain	40%



# Likelihood To Move To Utah by Region



# Clear Measurable Growth in Likelihood to Vacation in Utah Among Games' Watchers



# Americans Who Say “Likely” to Travel to or Vacation in Utah

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Single with Children	70%
African American 35-54	66%
Female 18-34	65%
25-44	61%
Female 35-54	60%
Working Women	59%
South Atlantic	59%
\$30-50K annual hh income	58%
Some College	57%
Pacific	56%
Catholics	56%
Other Non-Christian	55%
Single	55%
Female	55%
Post-Graduate	55%
Non Born Again Christian	54%
Married	54%



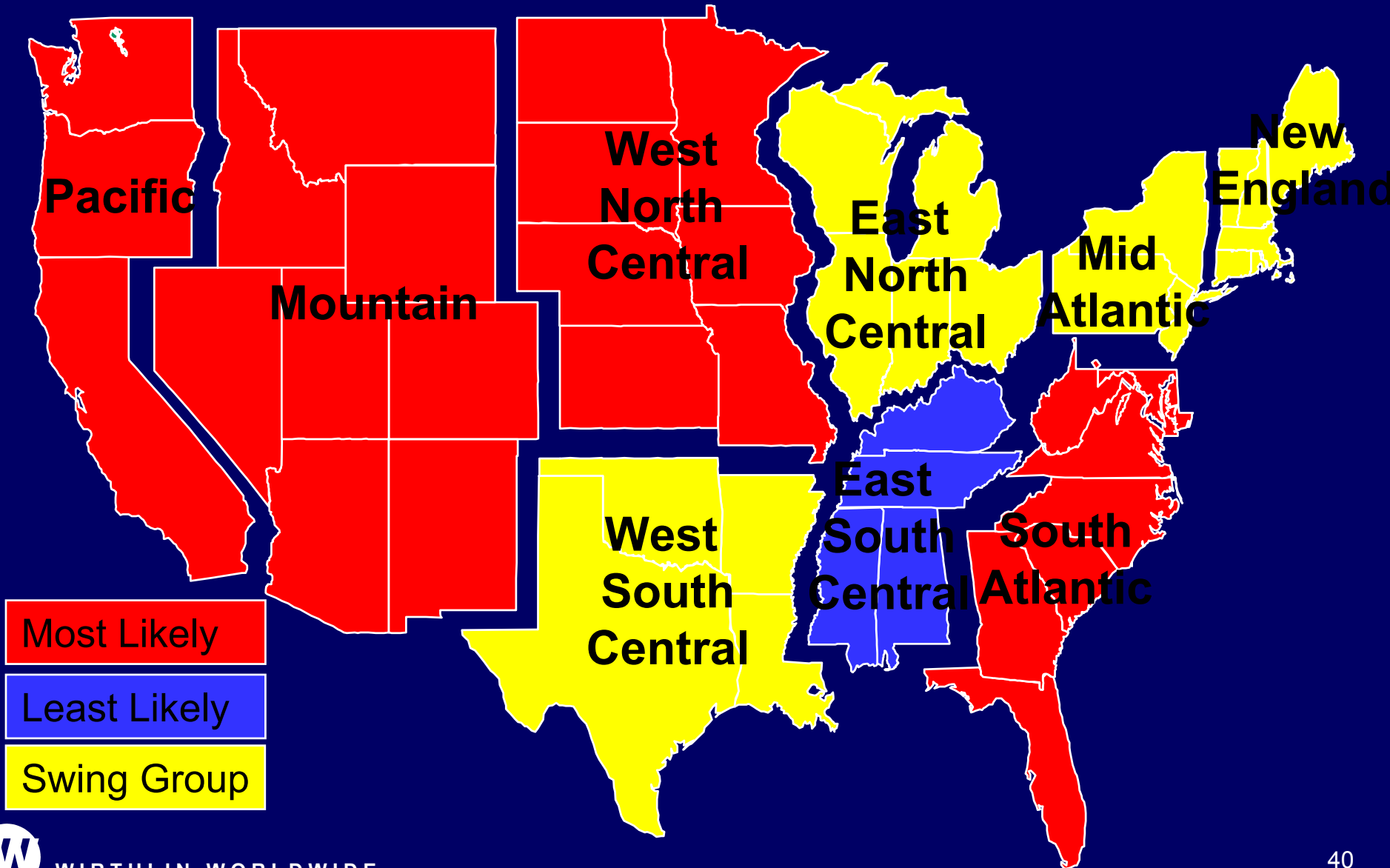
# Americans Who Say “Not At All Likely” to Travel to or Vacation in Utah

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East South Central	54%
African American 55+	54%
<\$15K annual hh income	45%
Female 55+	44%
65+	43%
Some HS education	40%
Hispanic	40%
Homemaker	40%
Div / Sep w/ children	36%
Divorced / Separated	35%
Baptists	33%
55+	33%
African American	31%
Div / Sep w/o children	31%
West South Central	30%
Born-Again Christian	29%
Retired	29%



# Likelihood To Vacation In Utah by Region





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## **Results Among Fortune 1000 Executives**



# Positive Mentions Among Execs Increase in Olympics, Salt Lake City, and Skiing

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<u>PRE</u>	<u>POST</u>	<u>POST SAW</u>	
1%	15%	14%	Olympics
4%	10%	11%	Salt Lake City
7%	10%	11%	Skiing
10%	7%	7%	Mormons
1%	2%	2%	Scenery
1%	2%	2%	Mountains
3%	1%	1%	Great Salt Lake
1%	1%	1%	Mormon Tabernacle Choir
2%	2%	1%	Clean Environment
0%	1%	1%	Lake Powell
1%	1%	1%	Good Business Environment
1%	1%	1%	Zion's National Park
1%	1%	1%	Family
0%	1%	1%	Sparsely populated
0%	1%	1%	Sundance
2%	2%	2%	Other

# Neutral Comments

## Dominated by LDS Church References

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<u>PRE</u>	<u>POST</u>	<u>POST</u> <u>SAW</u>	
18%	22%	23%	Mormons
5%	3%	3%	Skiing
2%	1%	2%	Olympics
1%	1%	2%	Great Salt Lake
1%	1%	2%	Utah Jazz
7%	1%	1%	Salt Lake City
4%	1%	1%	Mountains
0%	1%	1%	Open Spaces
1%	1%	1%	Conservative
1%	1%	1%	Isolated
1%	1%	1%	Scenery
0%	1%	1%	Snow
0%	1%	1%	Mormon Tabernacle Choir
1%	1%	1%	Good Business Environment
1%	1%	0%	Dry
1%	1%	0%	Cold
1%	0%	0%	Bigamy / Polygamy
4%	2%	2%	Other


# Negative Comments Are Very Few in Number Among Execs

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<u>PRE</u>	<u>POST</u>	<u>POST SAW</u>	
3%	1%	1%	Mormons
0%	1%	1%	Dry
0%	1%	1%	Conservative
0%	1%	0%	Salt Lake City
1%	1%	0%	Desert



# Most Execs Say They Didn't Learn Anything New about Utah, But Some Did

<b><u>Positive (Net)</u></b>	<b>21%</b>		Top mentions
Native American population	4%		
Beautiful scenery	2%		
History of the State	2%		
People in State (sub-net)	2%		
Olympic hosting efforts	1%		
<b>Didn't Learn Anything New</b>	<b>74%</b>		
<b>Neutral</b>	<b>2%</b>		
<b><u>Negative (Net)</u></b>	<b>2%</b>		Top mention
Drinking laws	2%		

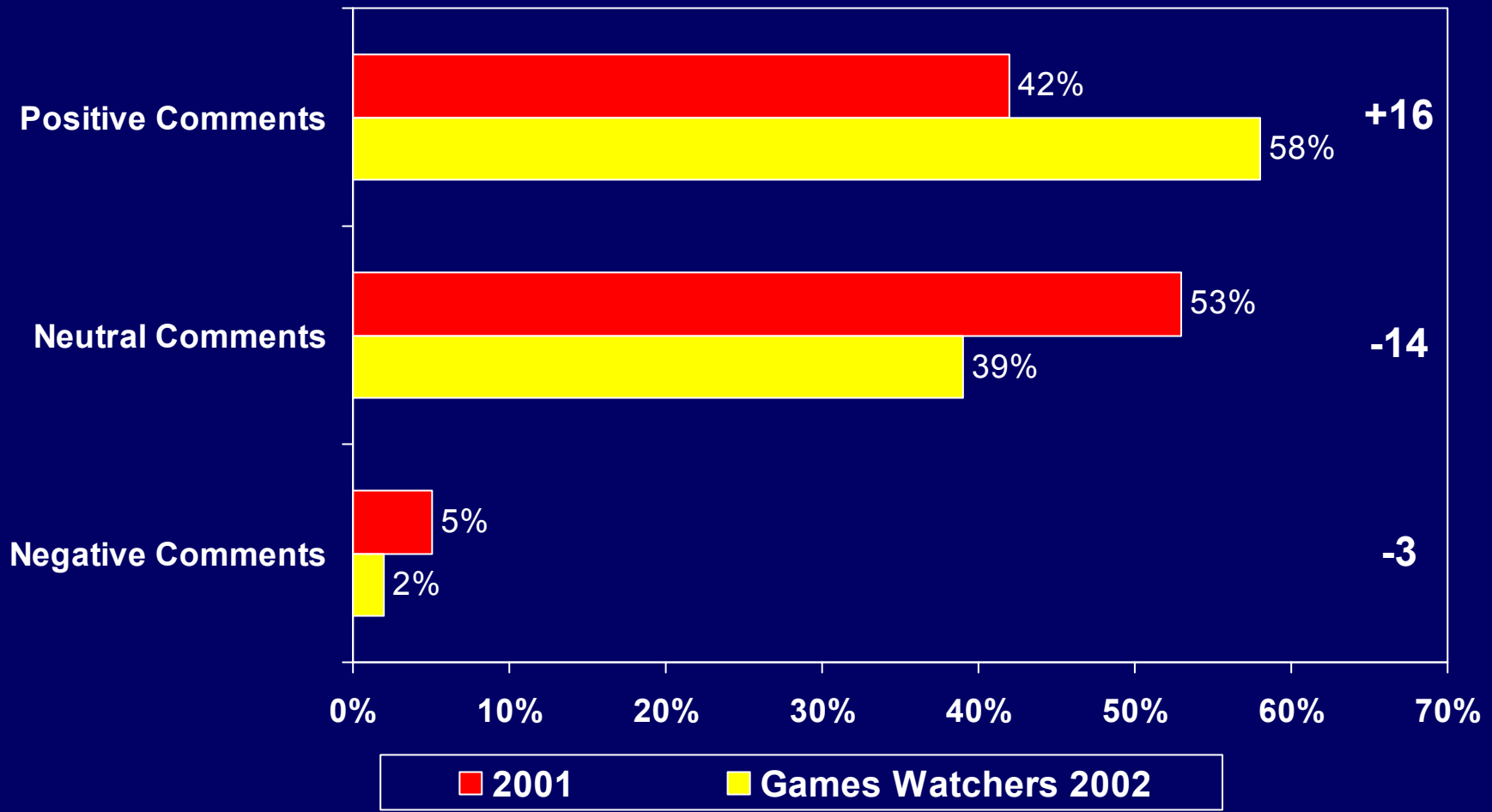


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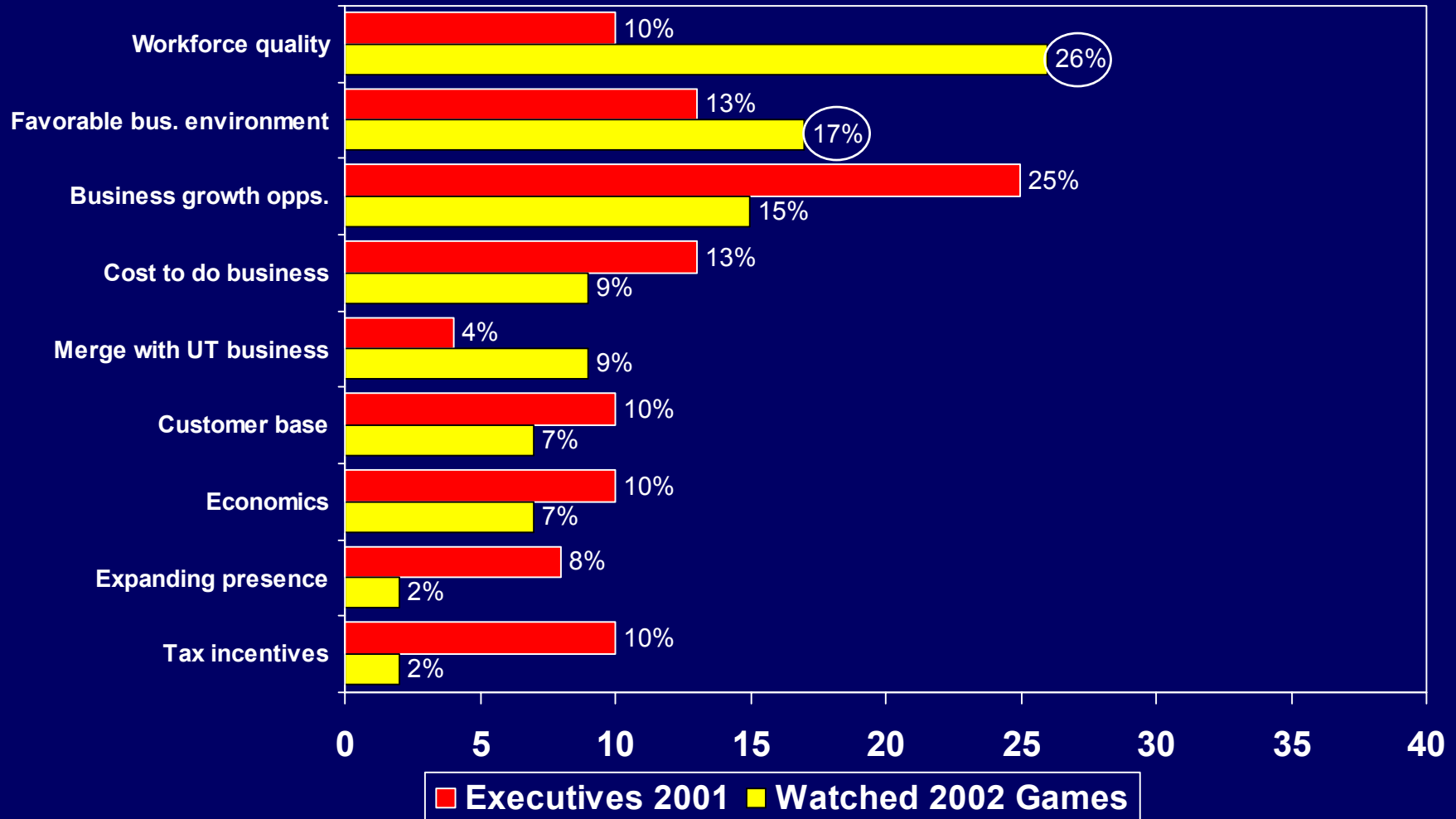
## **Image Measurements Among Executives**



# Significant Increase in Top-of-Mind Positive Comments about Utah Among Executives

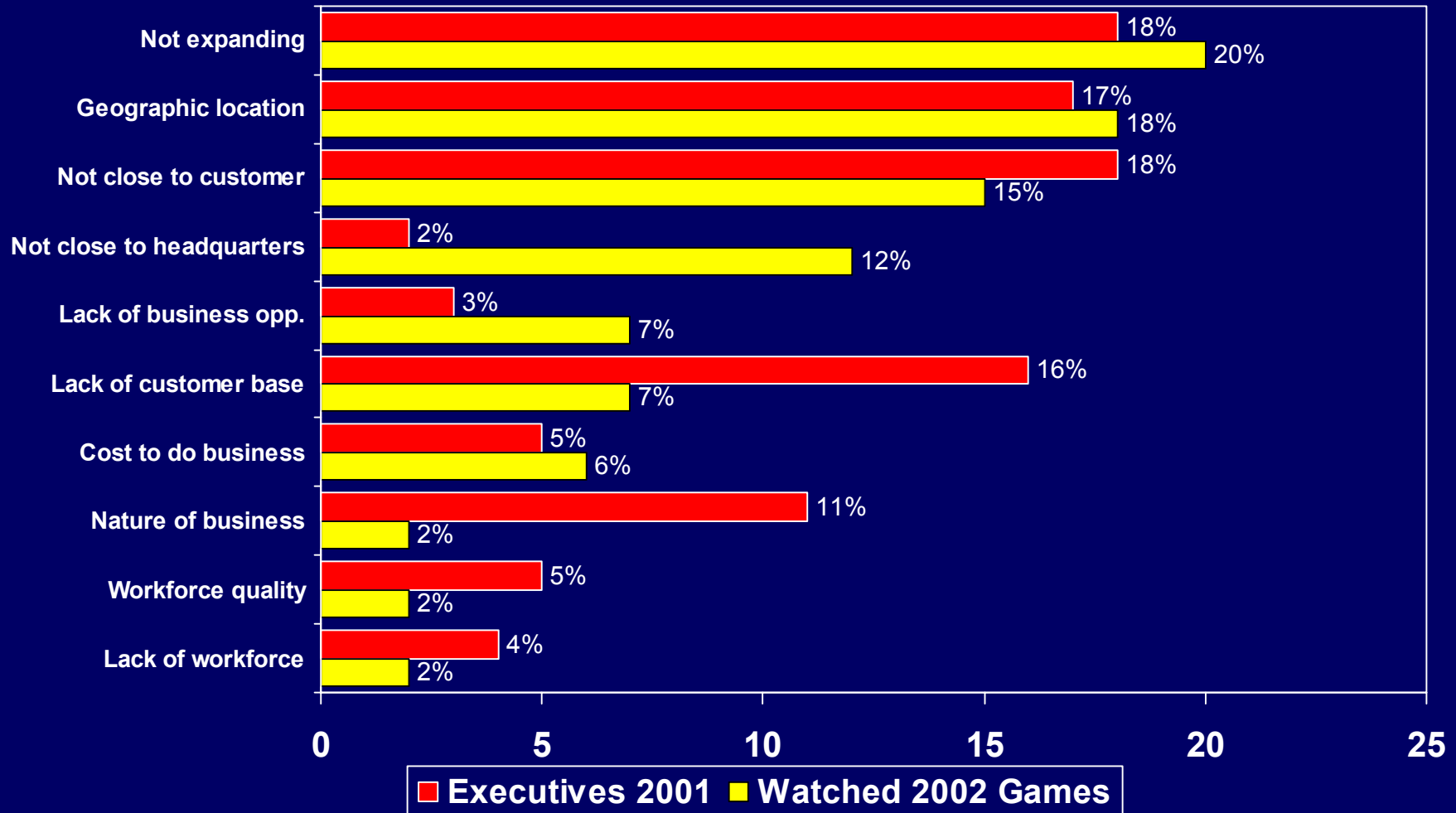


# Increased Recognition of Quality Workforce Among Companies Considering Utah





# Reasons to Not Locate to Utah are Still Distance and Opportunity

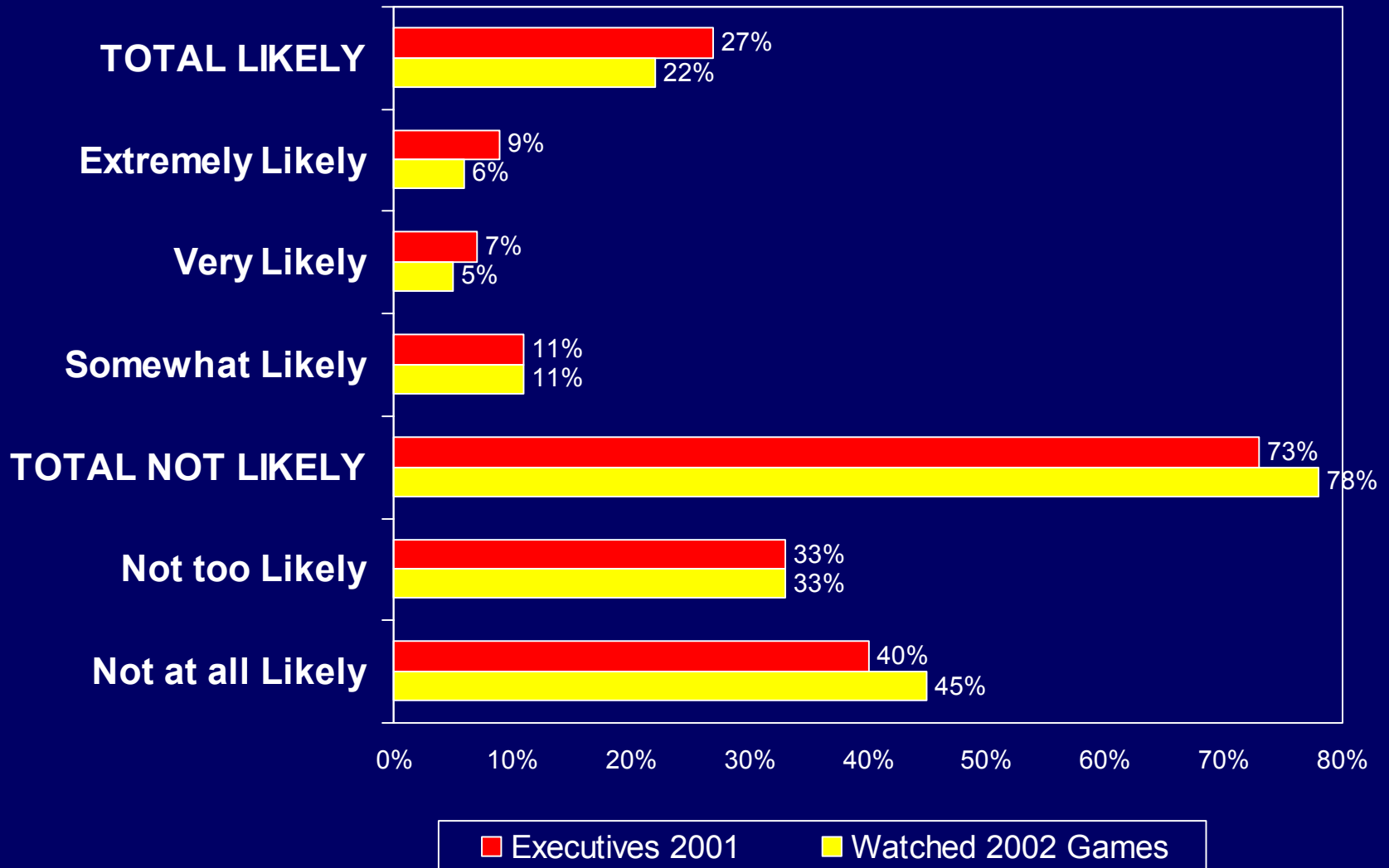


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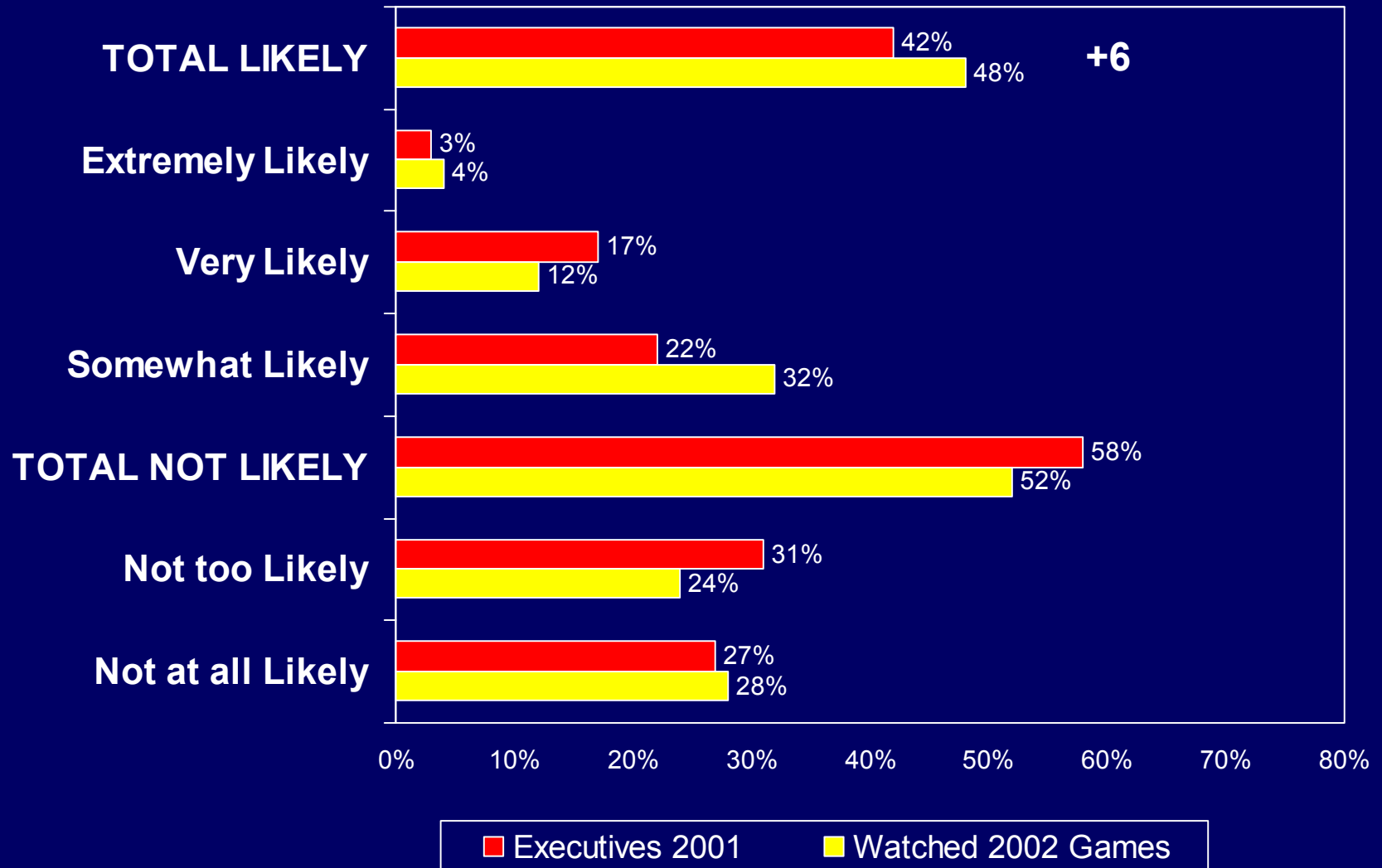
## **Impact on Behaviors Among Executives**



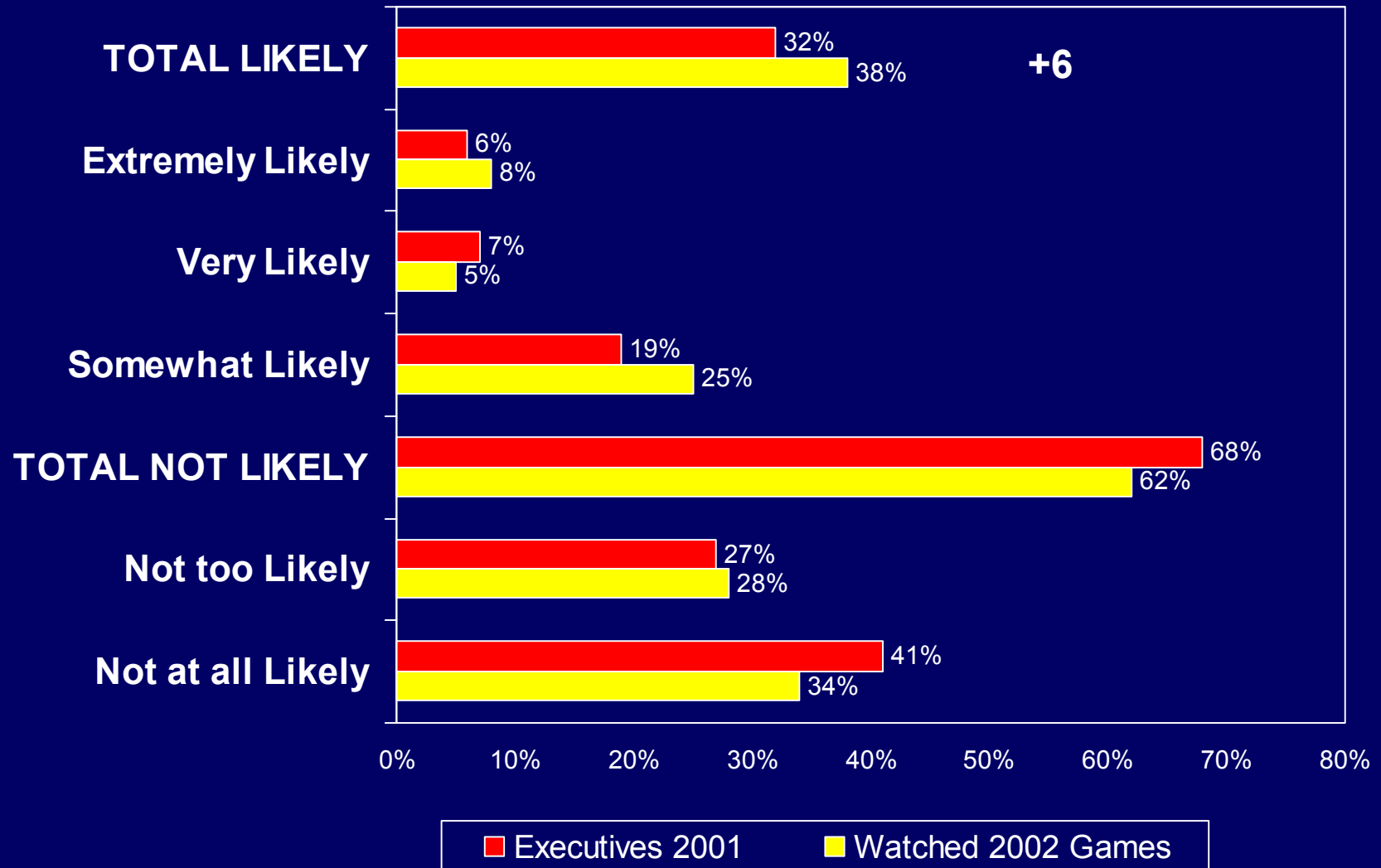
# Less Business Travel Shows in Response about Expected Biz Trips to Utah



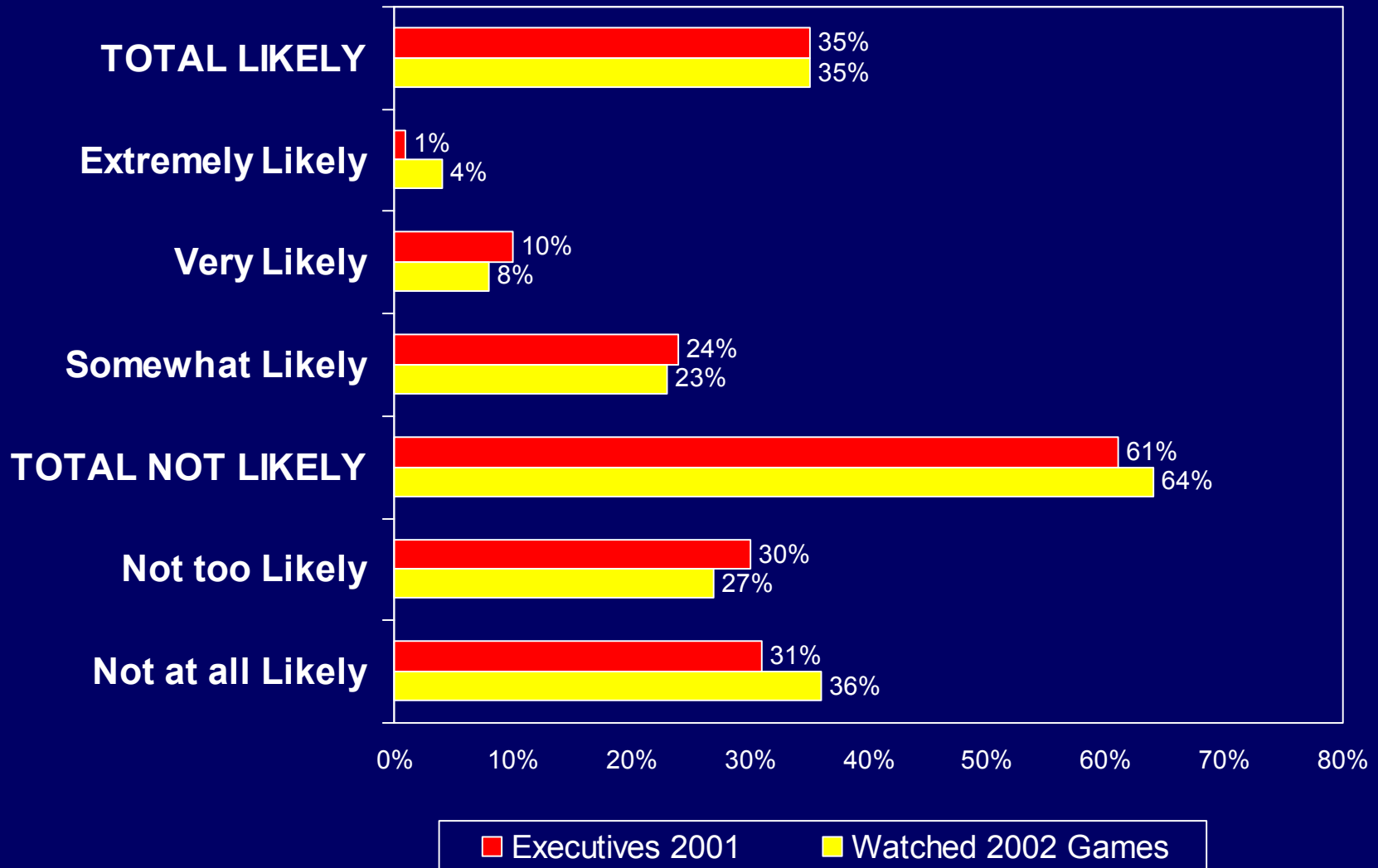
# Measurable Increase in Likelihood Executives Would Live in / Move to Utah



# Same Increase in Likelihood Executives Would Vacation Here



# Corporate Relocation or Expansion to Utah Steady at 35% of Fortune 1000



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## Strategic Imperatives



# Strategic Imperatives

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- 1) Continue to leverage Utah's winter sports and outdoor recreation opportunities seen during the Olympics.**
- 2) There is a clear need for higher informed awareness of the state—image today is defined by religion, proximity, and winter sports (Olympics).**
- 3) For living in Utah, tie these together with core quality of life issues:**
  - **STRENGTHS** – clean air, friendly people, safe environment in a place with four seasons and surrounded by outdoor recreation destinations
  - **OPPORTUNITIES** – quality education, reasonable taxes, and affordable cost of living



# Strategic Imperatives

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- 4) For vacationing, broaden the year-round perception of escape to beautiful mountains of Utah:**
  - STRENGTHS – winter sports are central today
  - EXPAND STRENGTHS – enjoy scenery and historical sites in Utah's national parks, lakes, streams, and resorts
  - OPPORTUNITIES – cost issues and building on improved perception of access
- 5) In corporate America, continue efforts to emphasize quality of workforce, quality of life, and quality of high-tech connectivity.**